User Guide

To Your Charity Checkout Account

charitycheckout

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1. Getting Started

1.1 Welcome to Charity Checkout

Welcome to Charity Checkout, the online payment system for good causes. We're committed to making online payments accessible to all.

This user guide has been produced as a comprehensive guide to your Charity Checkout account and covers everything you need to know about the system.

1.2 Completing the HMRC form (Step1)

If you would like us to reclaim Gift Aid on your behalf for donations via Charity Checkout, then you must return the Chv1 Form attached in your registration e-mail. This is a HMRC form that grants us permission to reclaim Gift Aid on your charity's behalf.

You will need to complete pages one and six of the document in full before returning a signed original version of the document to us at:

HMRC Forms
Charity Checkout
Business & Technology Centre
Bessemer Drive
Stevenage
Hertfordshire
SG1 2DX

1.3 Providing your bank details (Step 2)

We need to know where to transfer your charity's donations to, therefore you need to return the Bank Details Form attached in your registration e-mail to us as soon as you can.

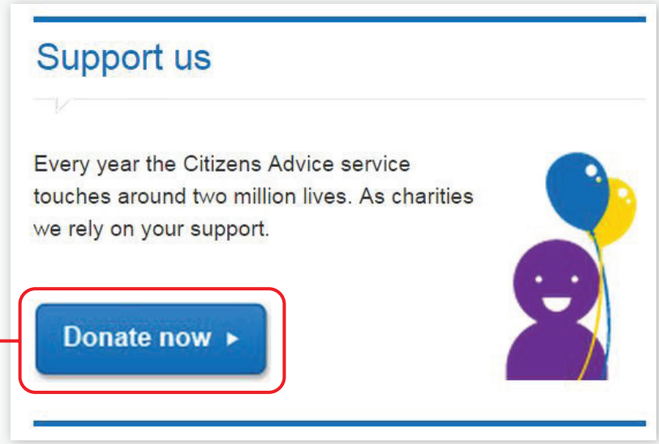
1.4 Website integration (Step 3)

To start accepting donations online you will need to place a 'Donate now' button on your website or integrate Charity Checkout directly within a page of your website. You can also integrate Charity Checkout with your charity's e-newsletters, Facebook page and other social media profiles.

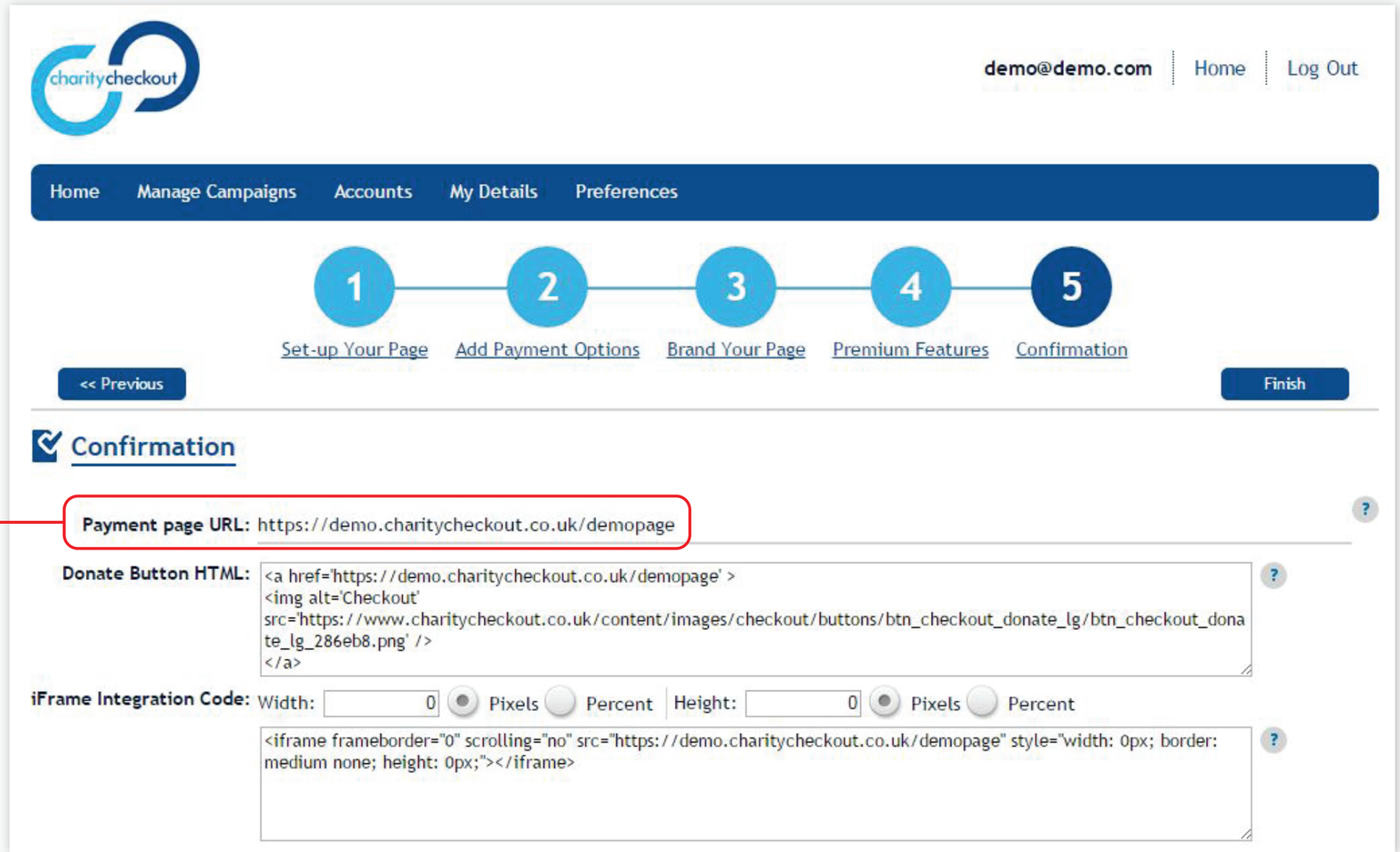
You have a choice of the following 4 options:

Use your own donate button

This is the easiest way to integrate Charity Checkout, and simply involves creating a link from your website or e-mails to your donation page. The donation page hyperlink can also be shared on social media profiles and other online platforms.

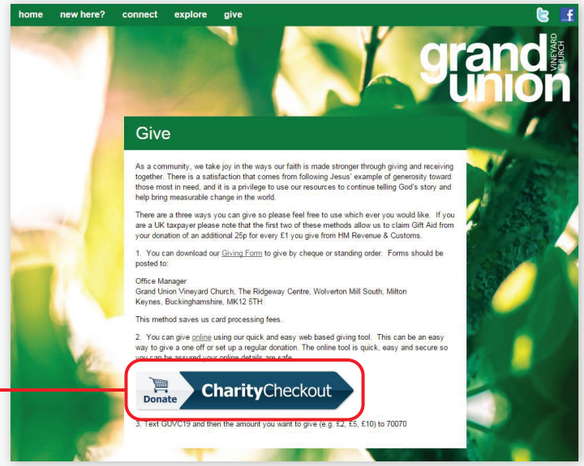

Support us
Every year the Citizens Advice service touches around two million lives. As charities we rely on your support.
Donate now ▸

Where do I find this link? 1 Click ‘Manage Campaigns’ 2 Click ‘Edit’ Campaign 3 Go to ‘Step 5’



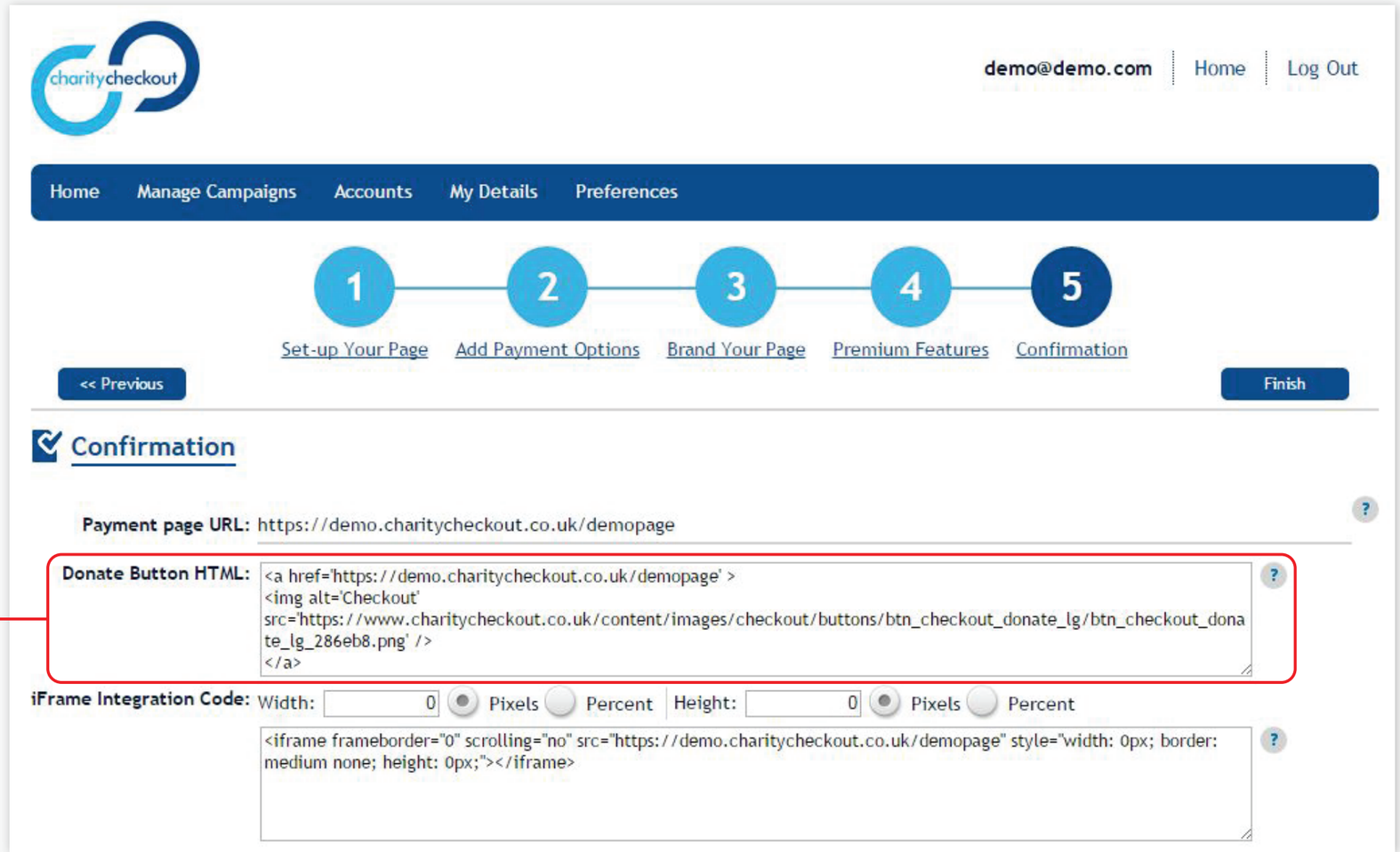
Use our donate button

This method of integration allows you to connect Charity Checkout to your website with the aid of HTML code. This code will display a branded 'Donate now' button linking directly to your Charity Checkout payment page.


home
new here?
connect
explore
give
grand union
VINEYARD CHURCH
Give
As a community, we take joy in the ways our faith is made stronger through giving and receiving together. There is a satisfaction that comes from following Jesus' example of generosity toward those most in need, and it is a privilege to use our resources to continue telling God's story and help bring measurable change in the world.
There are a three ways you can give so please feel free to use which ever you would like. If you are a UK taxpayer please note that the first two of these methods allow us to claim Gift Aid from your donation of an additional 25p for every £1 you give from HM Revenue & Customs.
1. You can download our Giving Form to give by cheque or standing order. Forms should be posted to:
Office Manager
Grand Union Vineyard Church, The Ridgeway Centre, Wolverton Mill South, Milton Keynes, Buckinghamshire, MK12 5TH
This method saves us card processing fees.
2. You can give online using our quick and easy web based giving tool. This can be an easy way to give a one off or set up a regular donation. The online tool is quick, easy and secure so
Donate
CharityCheckout
3. Text GUVC19 and then the amount you want to give (e.g. £2, £5, £10) to 70070

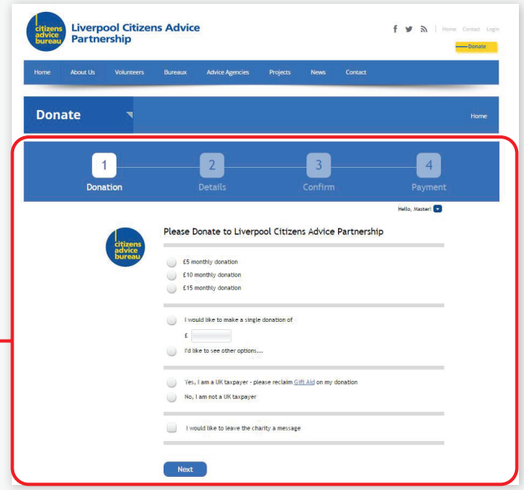
Where do I find this link?

1. Click 'Manage Campaigns'
2. Click 'Edit' Campaign
3. Go to 'Step 5'

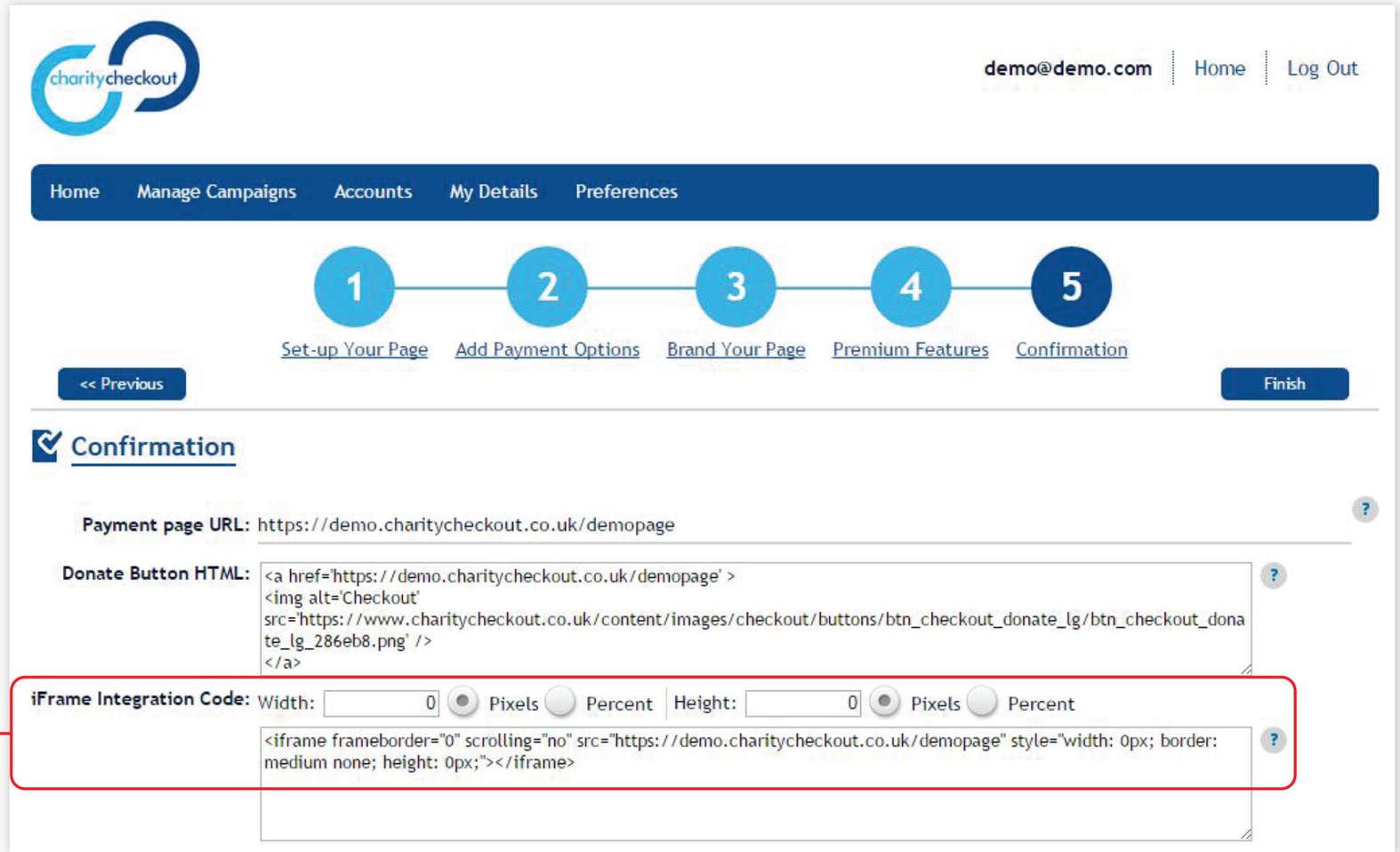


Keep the donation form within your website

This method of integration allows you to integrate Charity Checkout directly within a page of your website, using HTML code to create an iFrame.


Liverpool Citizens Advice Partnership
Donate
1 Donation
2 Details
3 Confirm
4 Payment
Please Donate to Liverpool Citizens Advice Partnership
£5 monthly donation
£10 monthly donation
£15 monthly donation
I would like to make a single donation of
I'd like to see other options....
Yes, I am a UK taxpayer - please reclaim Gift Aid on my donation
No, I am not a UK taxpayer
I would like to leave the charity a message
Next

Where do I find this code? 1 Click 'Manage Campaigns' 2 Click 'Edit' Campaign 3 Go to 'Step 5'



Facebook integration

It is also possible to integrate Charity Checkout directly into your charity's Facebook page, enabling your donors to give from within Facebook. In order to do this, please email info@charitycheckout.co.uk requesting the Facebook integration instructions.

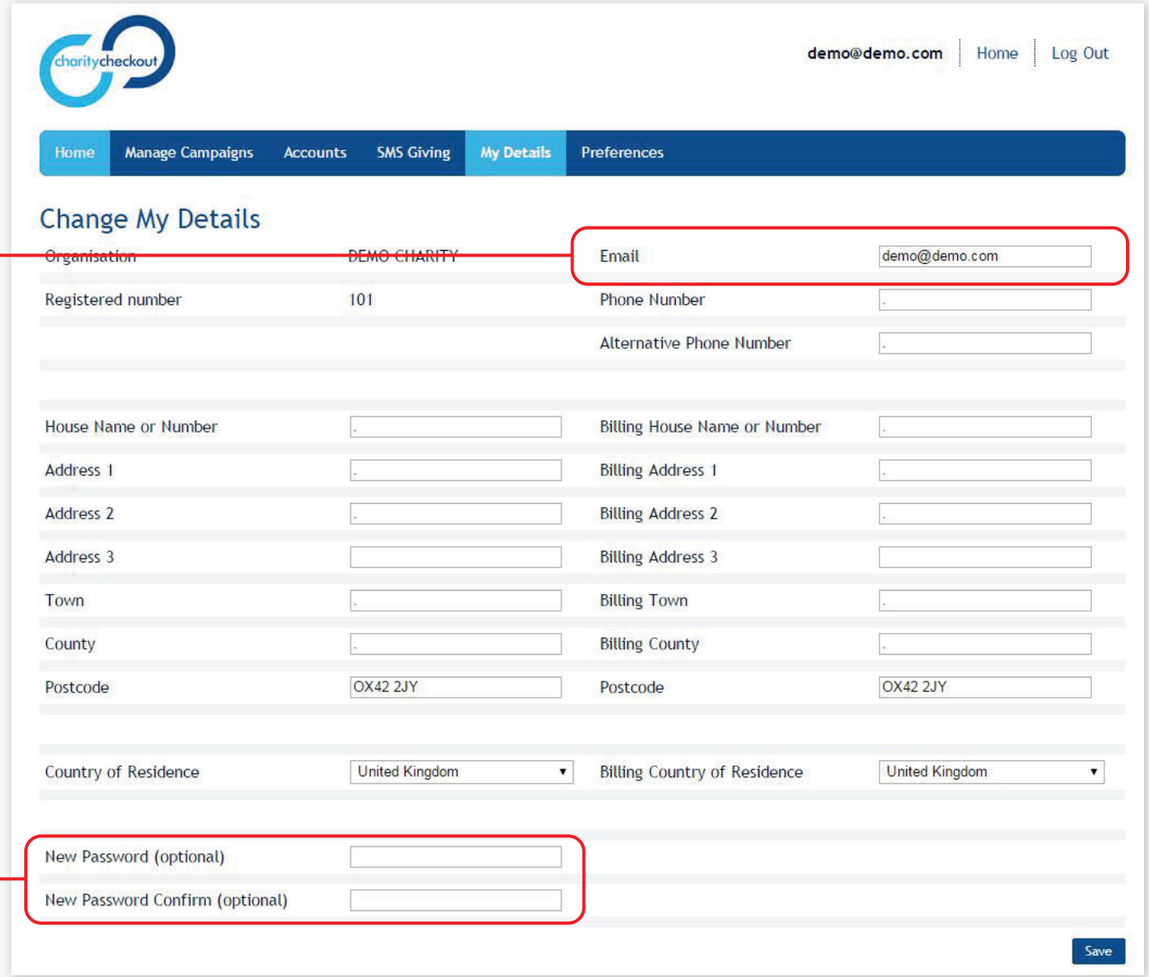
1.5 My Details (Step 4)

Updating your login email

You can update your login email under the ‘My Details’ area of your account.

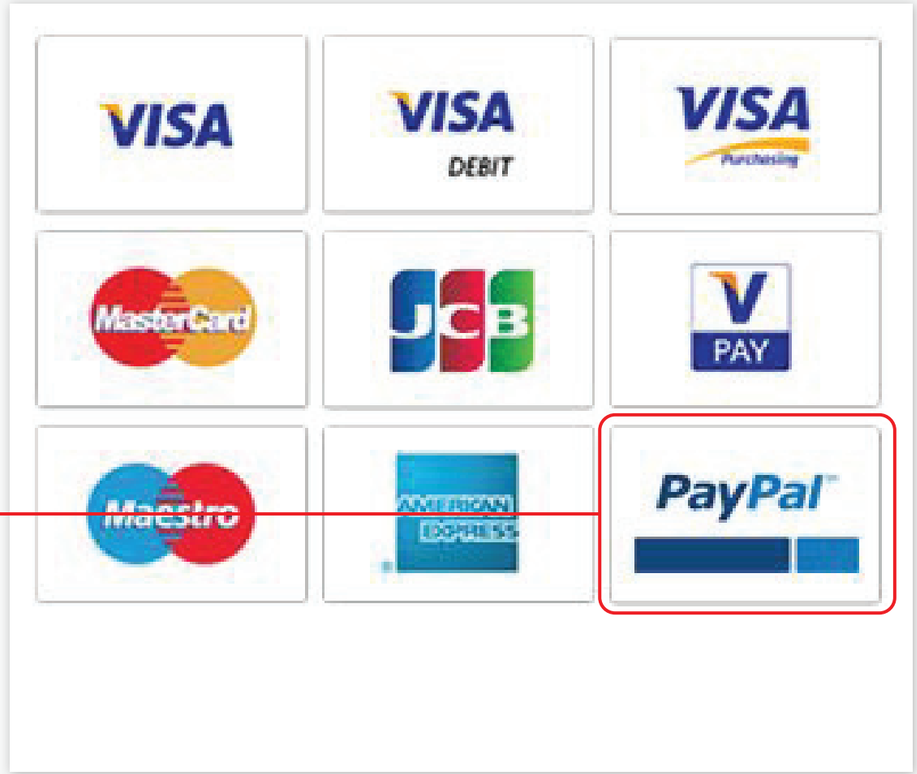
Updating your password

You can update your password under the ‘My Details’ area of your account. It is a good idea to update your password after you receive your initial registration email.



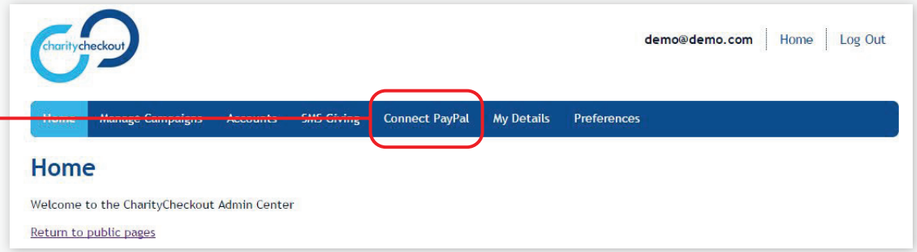
1.6 Connect PayPal

If you connect your PayPal account to Charity Checkout, your donors will see PayPal as an option on your payment page. The donations made via PayPal will go directly to your PayPal account, but all the information about the donations will be stored within Charity Checkout, as usual. We can also reclaim Gift Aid on your PayPal donations as with any payment method.



How do I connect PayPal?

1. Click ‘Connect PayPal’
2. Login to PayPal
3. Click ‘Grant Permission’



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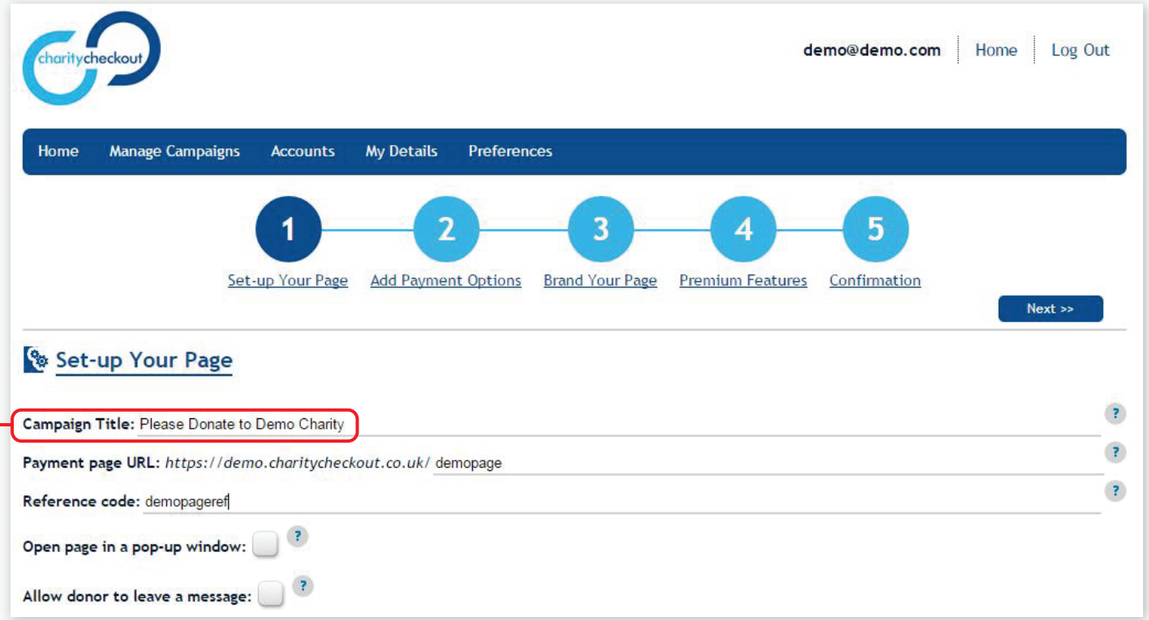
2. Setting up a campaign

2.1 Set-up your page

In order to set-up a campaign you must first login and follow the following steps:

1 Click ‘Manage Campaigns’ 2 Click ‘New Donations Campaign’

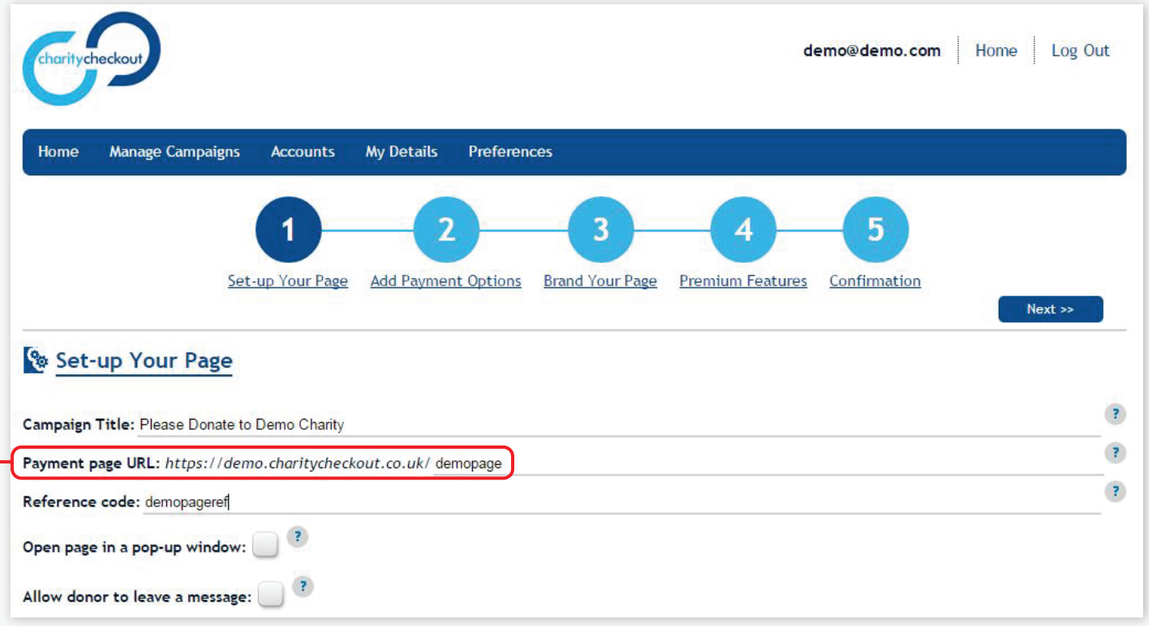


Choose a campaign title

You can choose a campaign title, such as ‘Sponsor a Dog’ or ‘Thank you for donating to our charity’. This will appear at the top of the payment page.

Choose a payment page URL

The payment page must have a URL address. You can decided the URL address your payment page can be found at. This must be unique for each payment page.



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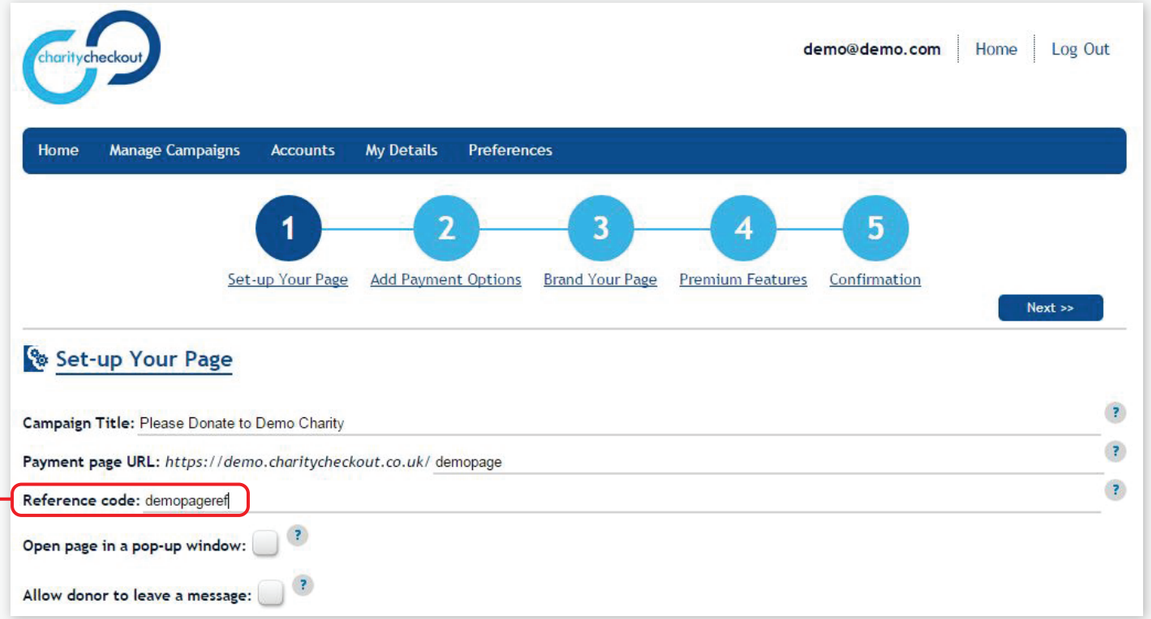
Choose a reference code

This is your own internal reference for the campaign, so that you know which donations relate to which campaign. This must be a unique reference. It will not be visible to your donors.

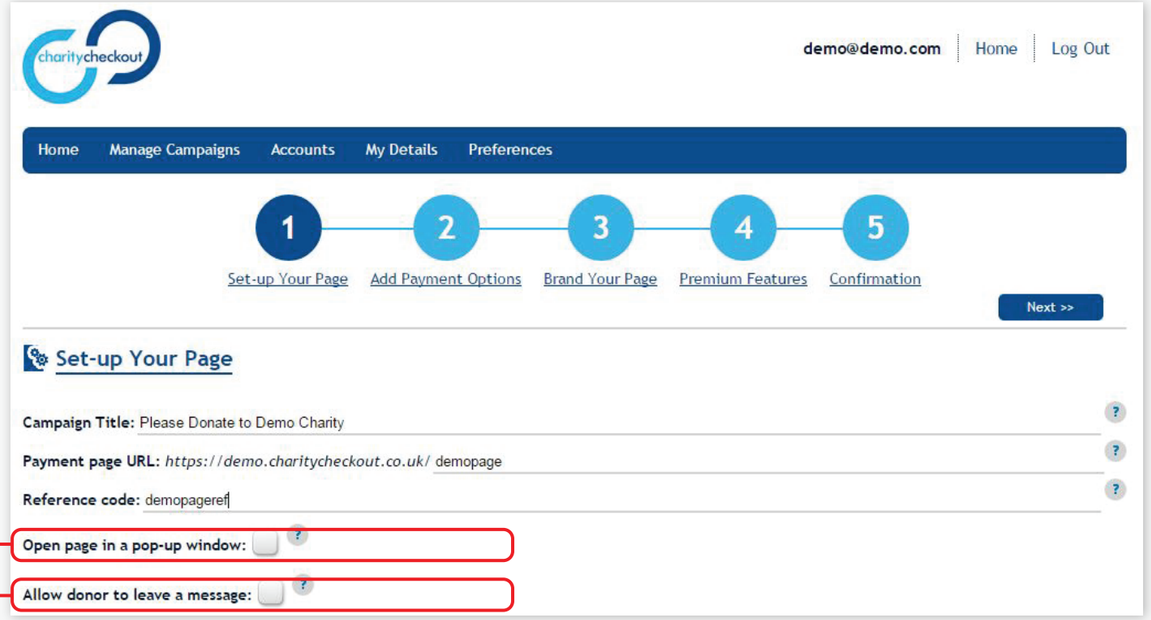


Open page in a pop-up window

If you tick this box, the payment page will open in a new window when the donor clicks the 'Donate now' button on your website. If the box is unticked, the payment page will open in the same window, this is the default setting.

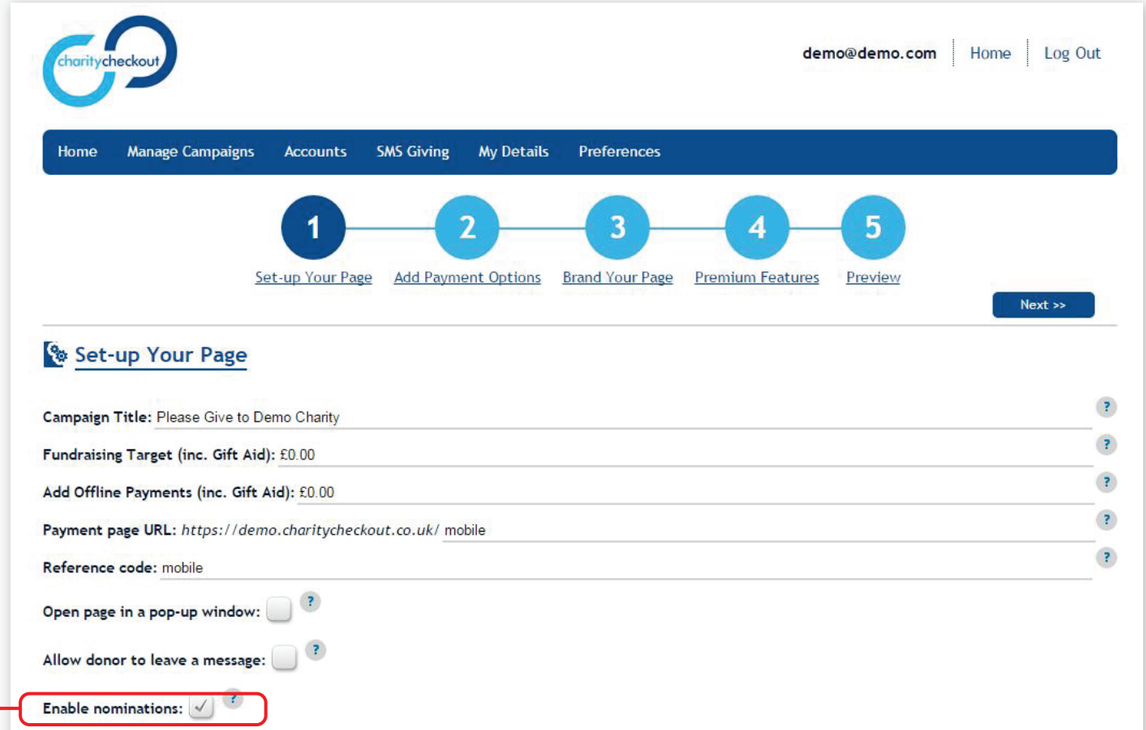
Allow donor to leave a message

If you tick this box, donors can leave a private message for the charity when they donate. This message will appear on the 'Payments' page under the 'Accounts' section of your account.

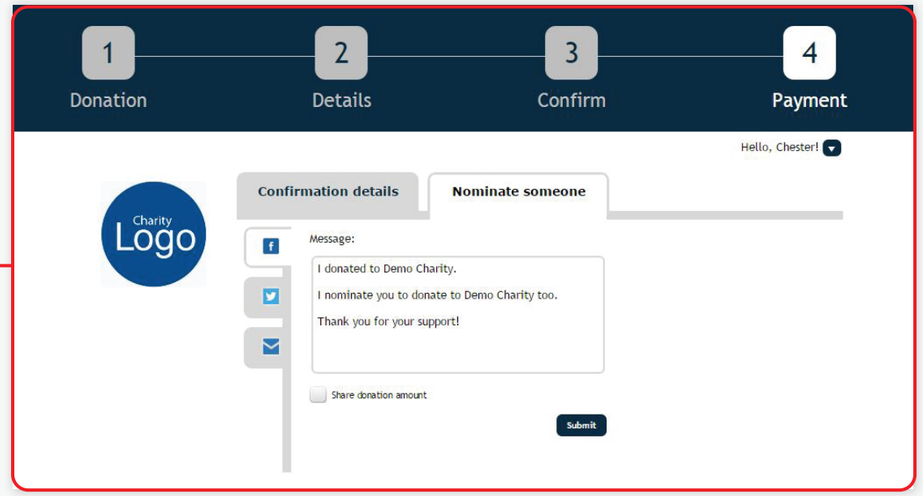


Enable nominations

This feature enables your donors to nominate a friend to donate to your charity. They can do this via email, Facebook or Twitter immediately after having made a donation.



Nomination example



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2.2 Add payment options

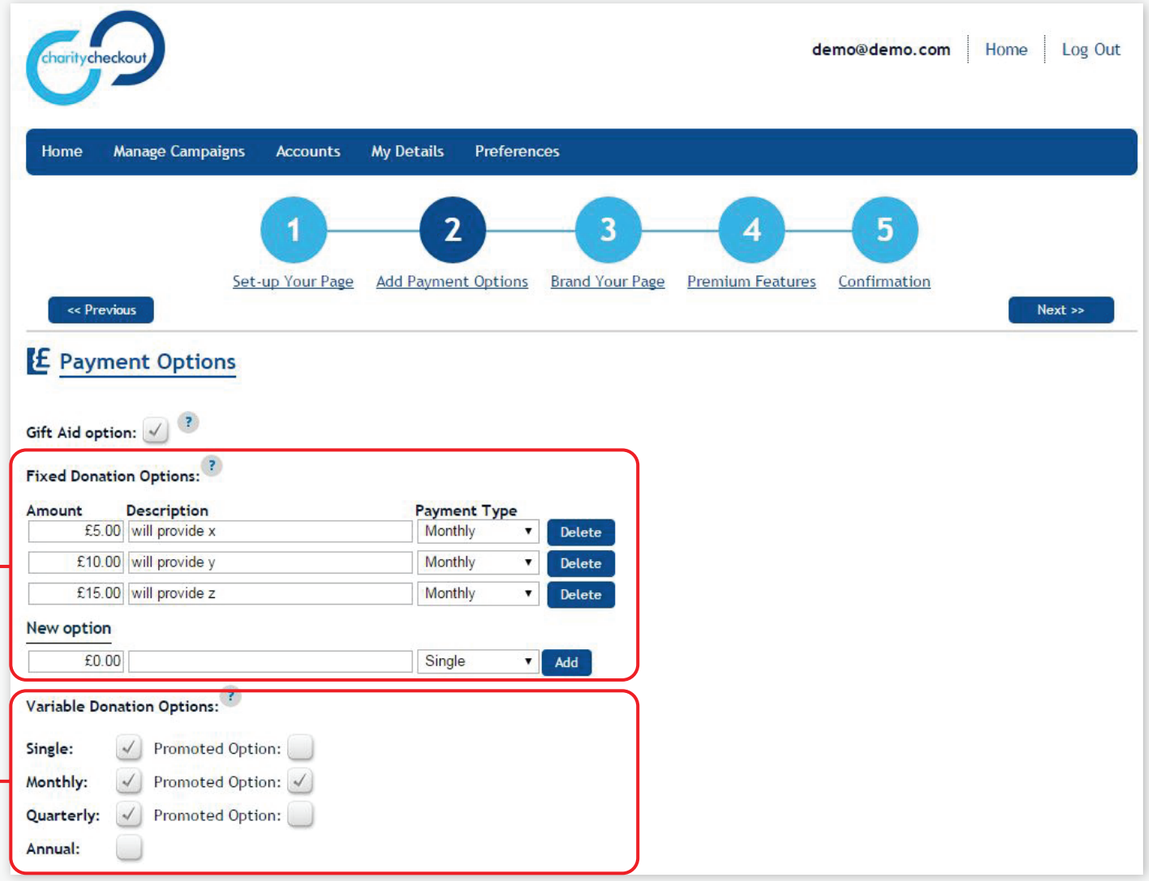
Fixed payment options

You have the option to add fixed or suggested payment options to your campaign, such as £10 Monthly. In addition to this, you can add a description for each payment option.

Variable payment options

This allows you to add variable payment options to your payment page enabling your donors to choose any sum they wish to donate.

You can allocate one of these options to be the 'Promoted Option', meaning it will be the choice your donors will see first.



2.3 Brand your page

Choosing colours

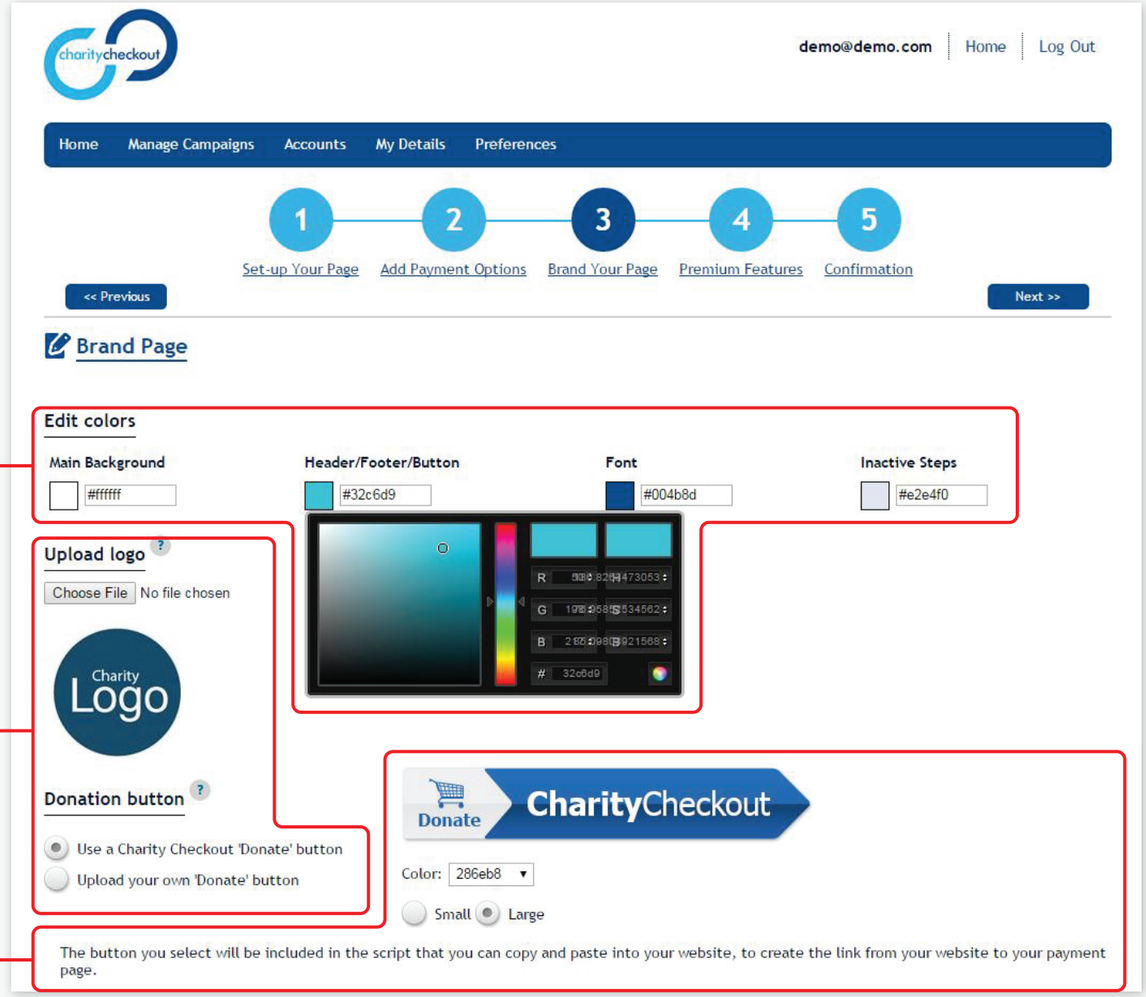
You are able to edit the colour of your payment page in order to suit your charity's branding and style.

Uploading an logo/image

You can also upload a logo or image specific to your campaign.

Choosing a donate button

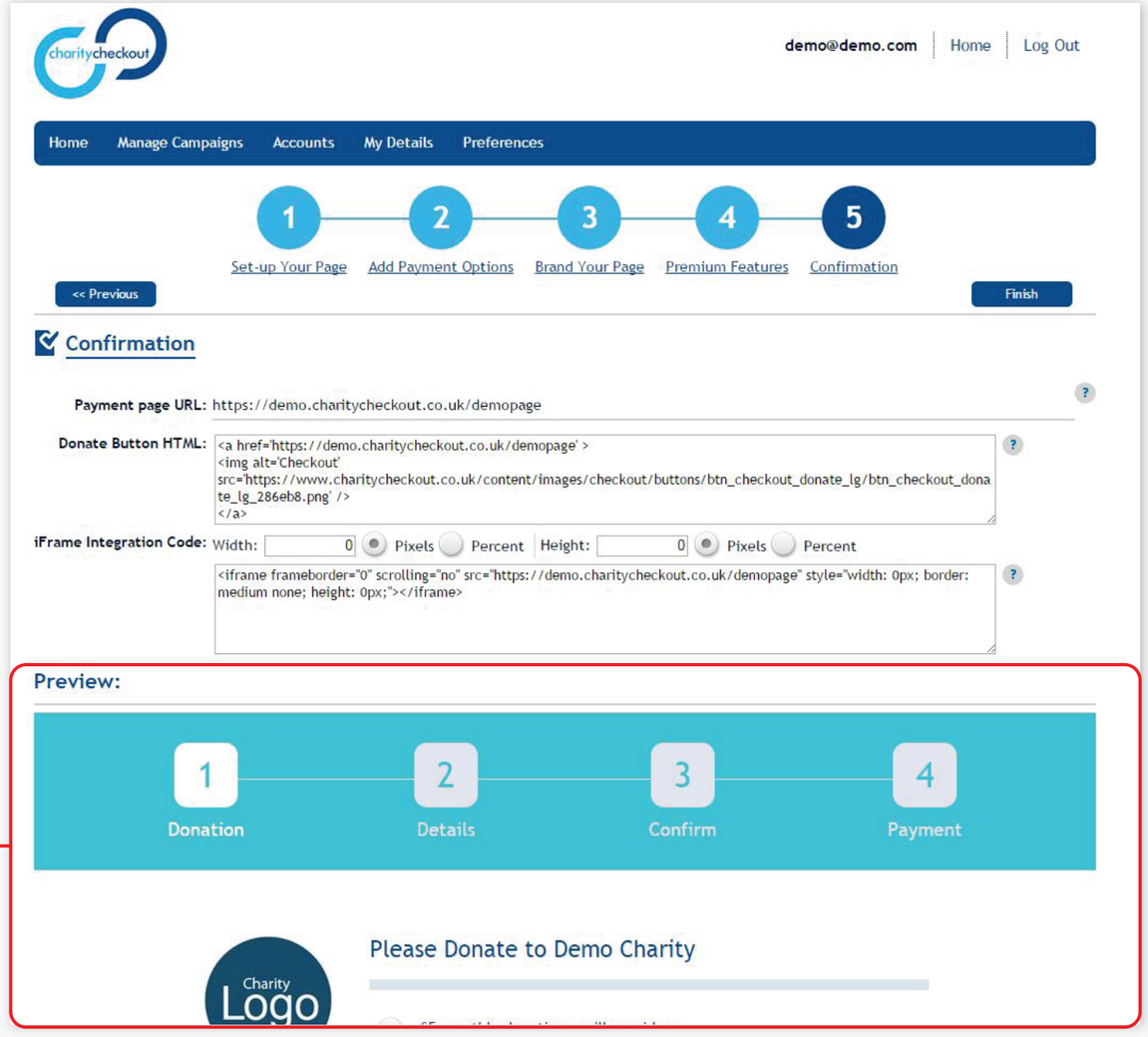
You can decide which style of 'Donate now' button you wish to use on your website, or upload your own.



2.4 Preview

The final step will display a preview of the campaign you have created.

This page will also provide you with various integration methods and codes, as explained in section 1.4 of this guide.



2.5 Preferences

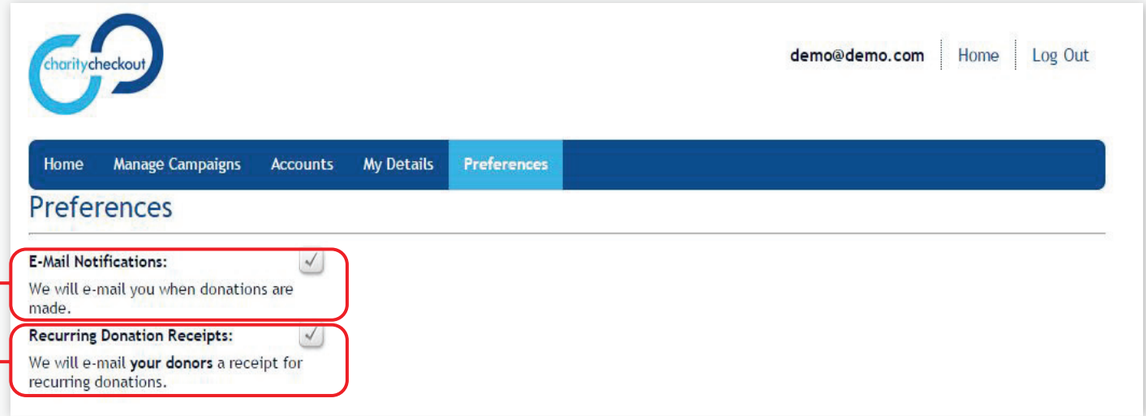
In the ‘Preferences’ section of your account you will be able to control the alerts you and your donors receive when donations are made.

E-Mail notifications

We will send your charity a notification alert each time a donation is made to your charity. You can disable this under ‘Preferences’ by unticking the box.

Recurring donation receipts

We email donors a receipt for each payment they make. You can disable this for recurring donations, meaning that your donors will only receive this receipt when they make a one-off donation or set-up a new ongoing donation.

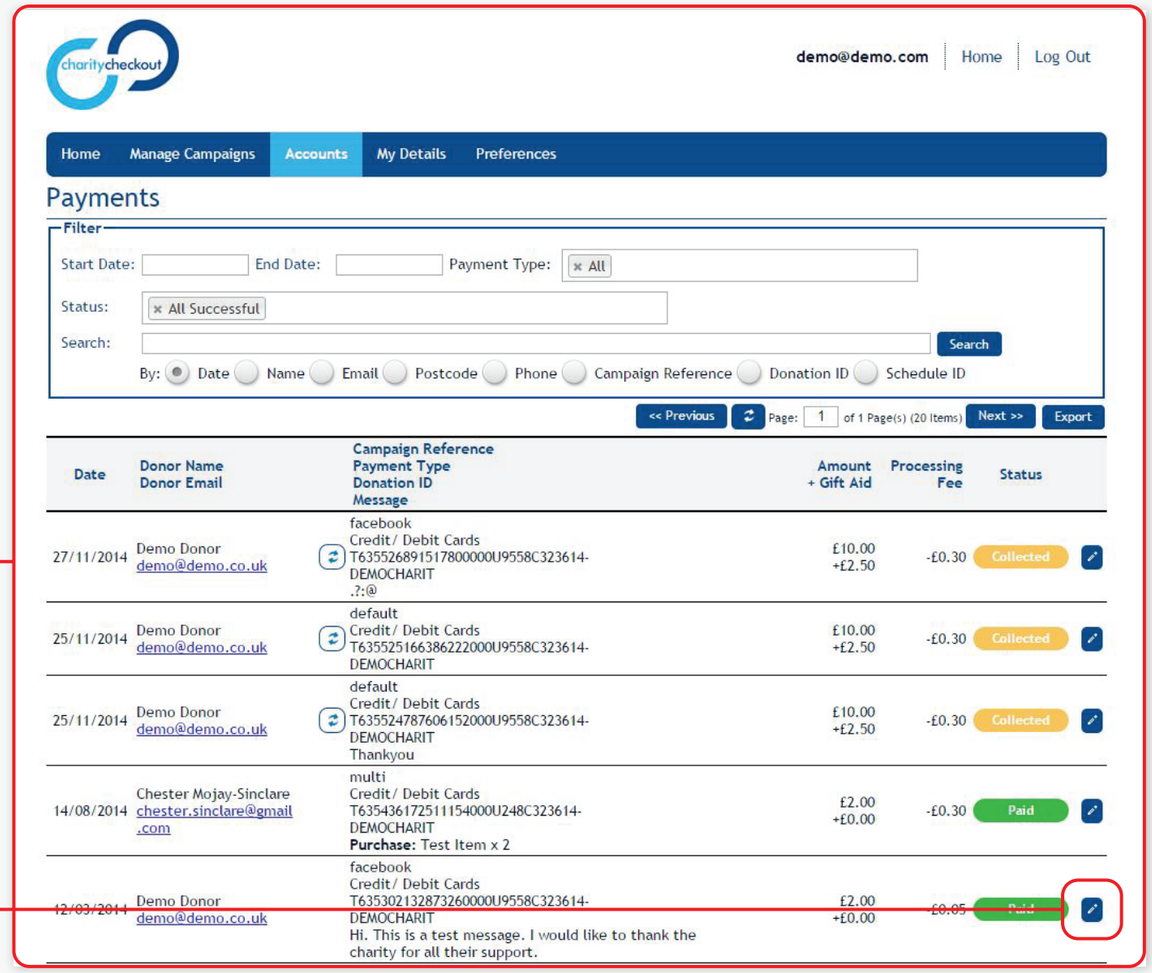


3. Accounts

The accounts area enables you to search, view, change, cancel and refund donations that have been made to your charity. In this area you can also access all the information about your donors at any time.

3.1 Payments

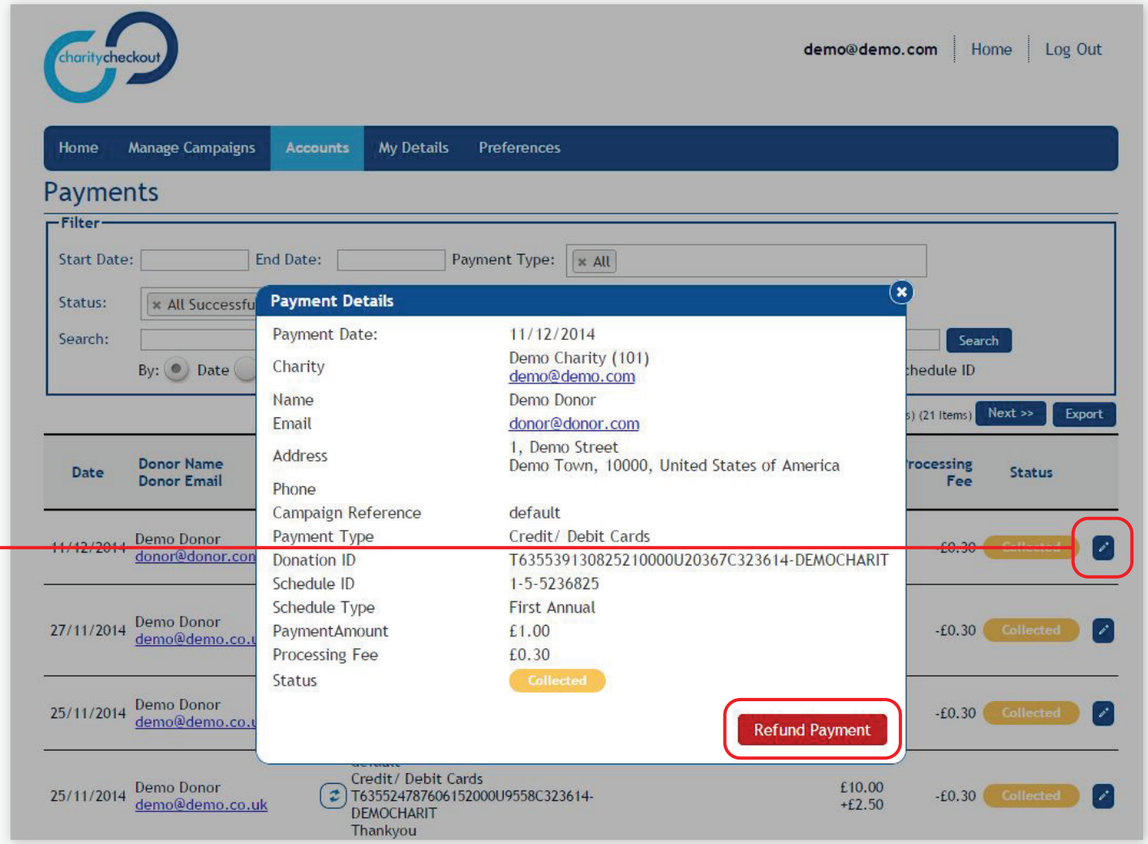
This area shows all the payments that have been made to your charity. It includes basic information about the payment and the individual who made it.



If you click this button further details about the payment will appear

Refunds

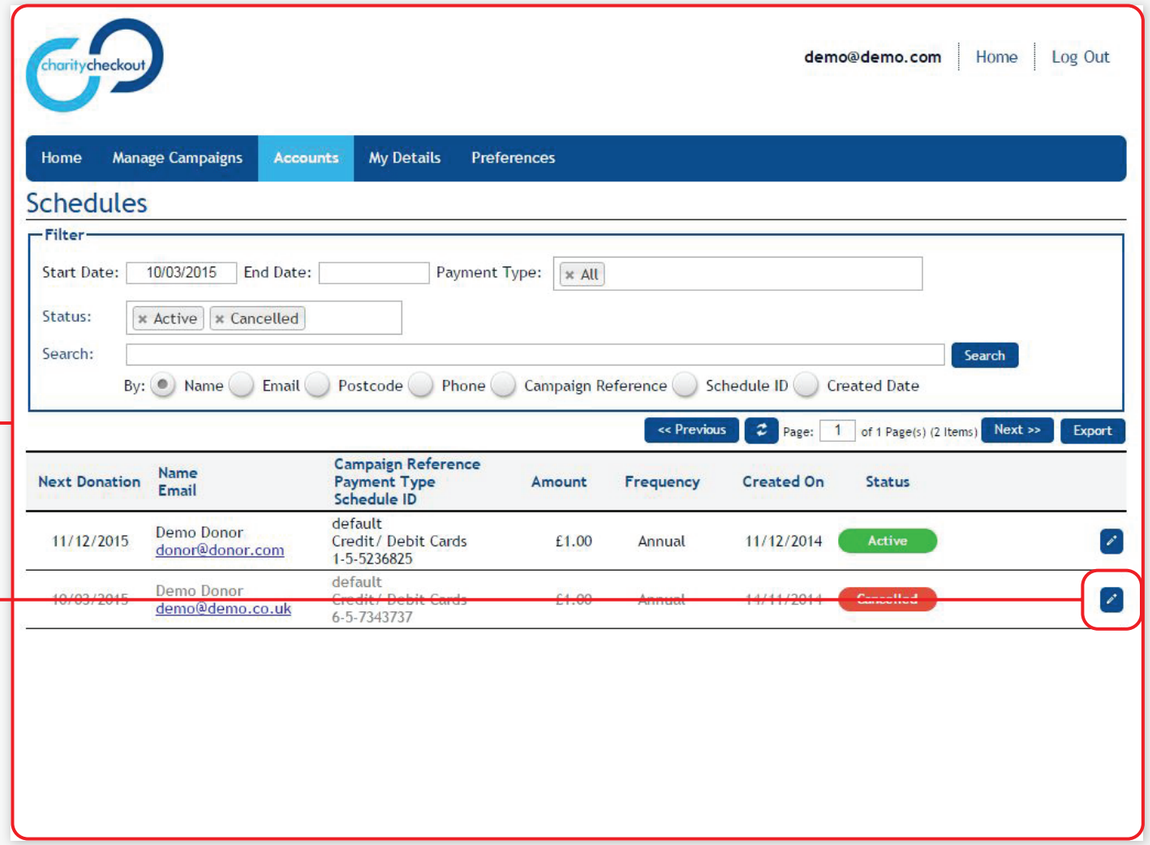
If a payment is eligible for a refund your will notice a ‘Refund Payment’ button visible on the further details tab for that particular payment.



3.2 Schedules

This area shows all the schedules that have been set-up to your charity. It includes basic information about the schedules and the individual who set it up

If you click this button further details about the schedule will appear



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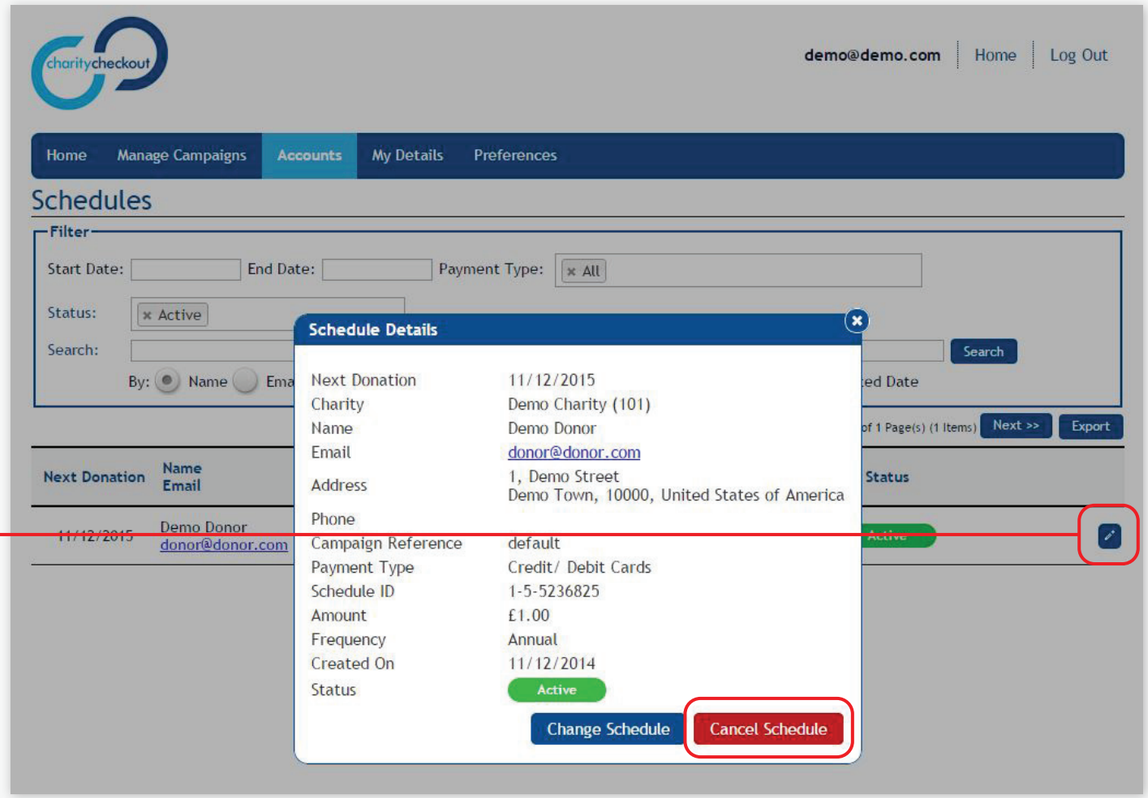
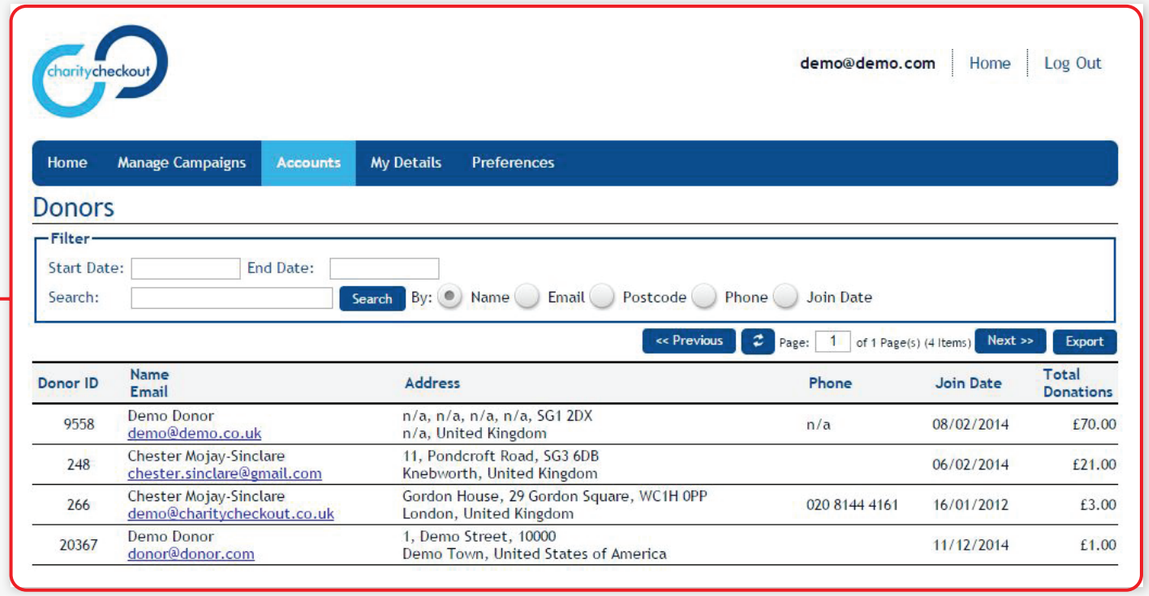
Cancel schedules

It is possible to cancel an active payment schedule at any time. This will result in the cancellation of the recurring payment.



3.3 Donors

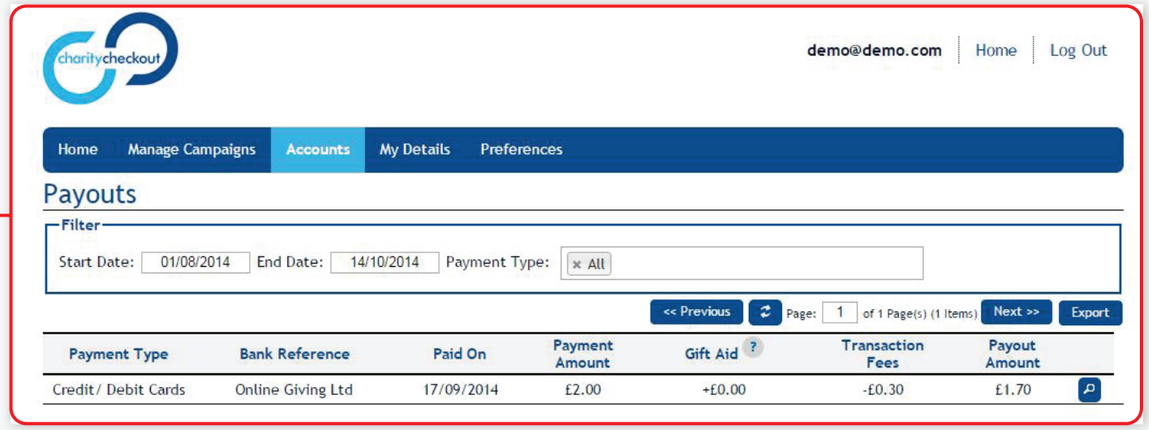
This area provides information about all your donors, as well as a running total of the sum of their donations.



Donor ID	Name Email	Address	Phone	Join Date	Total Donations
9558	Demo Donor demo@demo.co.uk	n/a, n/a, n/a, n/a, SG1 2DX n/a, United Kingdom	n/a	08/02/2014	£70.00
248	Chester Mojay-Sinclare chester.sinclare@gmail.com	11, Pondcroft Road, SG3 6DB Knebworth, United Kingdom		06/02/2014	£21.00
266	Chester Mojay-Sinclare demo@charitycheckout.co.uk	Gordon House, 29 Gordon Square, WC1H 0PP London, United Kingdom	020 8144 4161	16/01/2012	£3.00
20367	Demo Donor donor@donor.com	1, Demo Street, 10000 Demo Town, United States of America		11/12/2014	£1.00

3.4 Payouts

This area provides information about the transfer of funds to your charity. This will be updated every time funds are transferred to your charity, and a breakdown of the payments included in each payout can be obtained by clicking on the magnifying glass symbol.

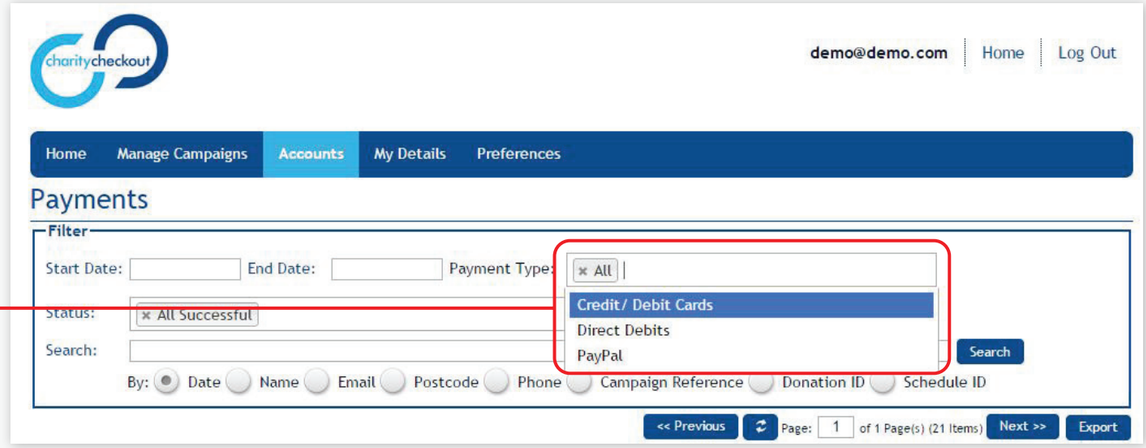


Payment Type	Bank Reference	Paid On	Payment Amount	Gift Aid	Transaction Fees	Payout Amount
Credit/ Debit Cards	Online Giving Ltd	17/09/2014	£2.00	+£0.00	-£0.30	£1.70

3.5 Search & filters

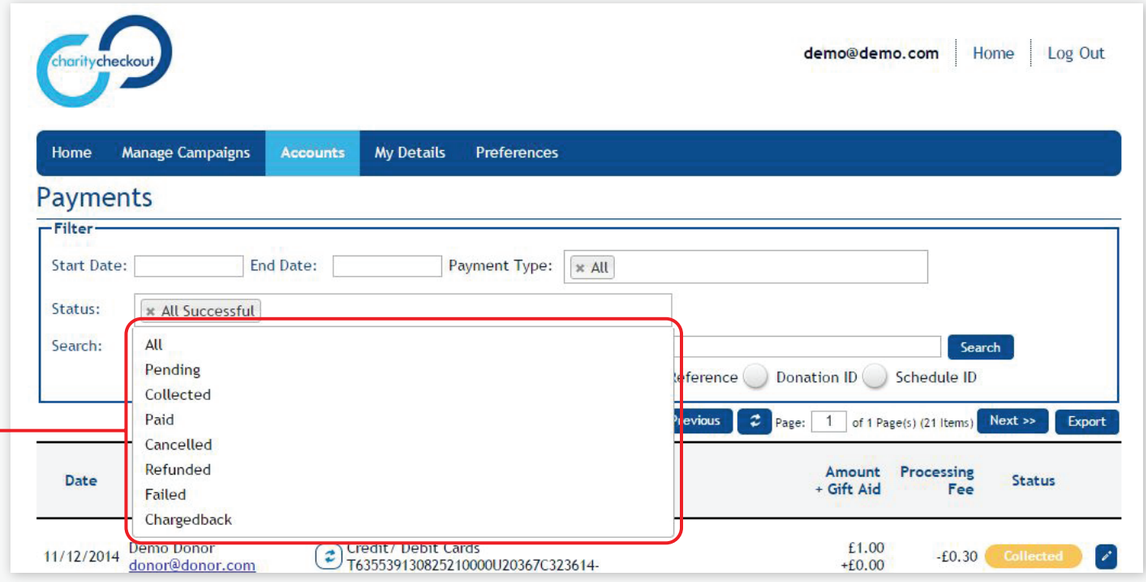
Payment Type filter

The Payment Type filter will allow you to view donations via credit/ debit card, PayPal or Direct Debit, if applicable. You will find this under Payments, Schedules and Payouts.



Status filter

The Status filter will allow you to view successful or unsuccessful payments independently. There is also a status filter on the 'Schedules' page, which can be used to view active, failed or cancelled schedules.



Payment Statuses

Successful Statuses

Pending	The payment is being processed. This status only applies to Direct Debit payments.
Collected	The payment has been collected from the donor's bank and will be included in the next payout.
Paid	The payment has been paid to the charity.

Unsuccessful Statuses

Failed	The payment failed, no funds were transferred.
Cancelled	The payment was cancelled, no funds were transferred. This status only applies to Direct Debit payments.
Refunded	The payment was reversed and the funds refunded to the donor.
Chargedback	The payment was forcibly reversed by the donor's bank and the funds refunded to the donor.

Schedule Statuses

Successful Statuses

Active	The schedule is active and will continue to produce payments.

Unsuccessful Statuses

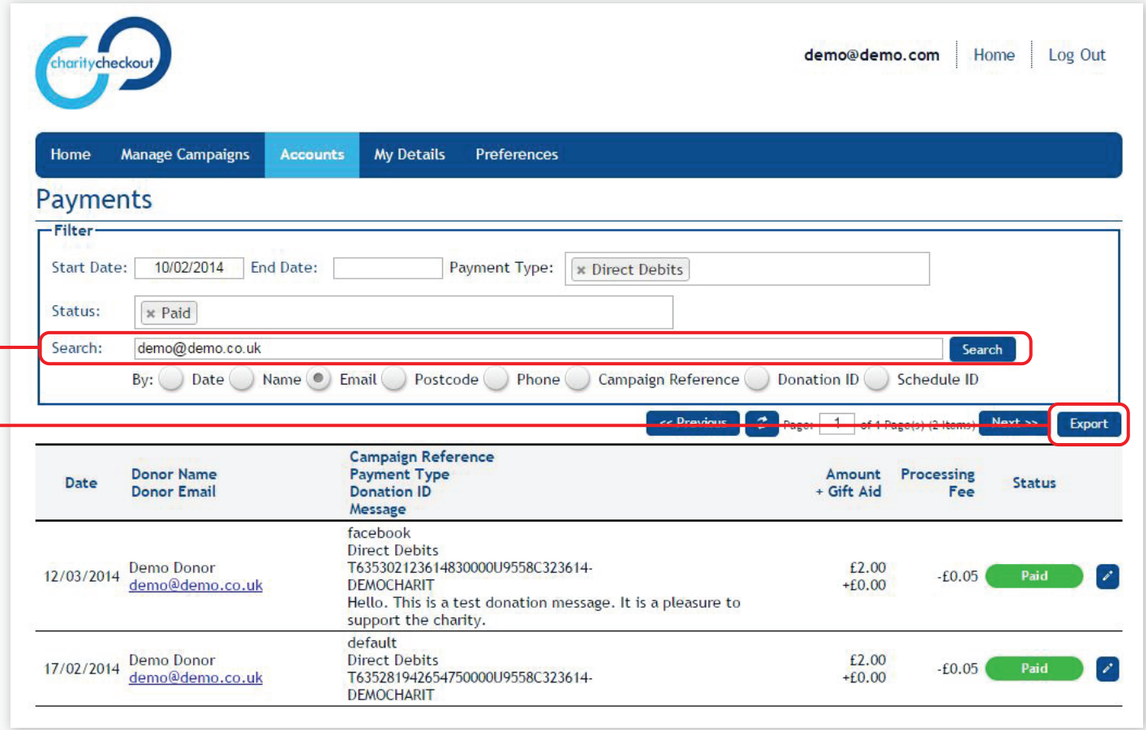
Failed	The schedule has failed and will not continue to produce payments. This may be due to an issue with the payment method used.
Cancelled	The schedule has been cancelled and will not continue to produce payments. This may have been cancelled upon the donor's request.

Search feature

The Search feature will allow you to find specific payments, schedules or donors using various criteria such as the: payment date, donor's name, donor's email, campaign reference and other criteria.

3.4 Export accounts data

The accounts data can be easily exported at any time using the 'Export' button available on each page. This will allow you to download the data about your donors and the payments that have been made to your charity, which you can then import into third-party CRM, accounting or marketing software.



4. Premium features

4.1 Smart Text Giving

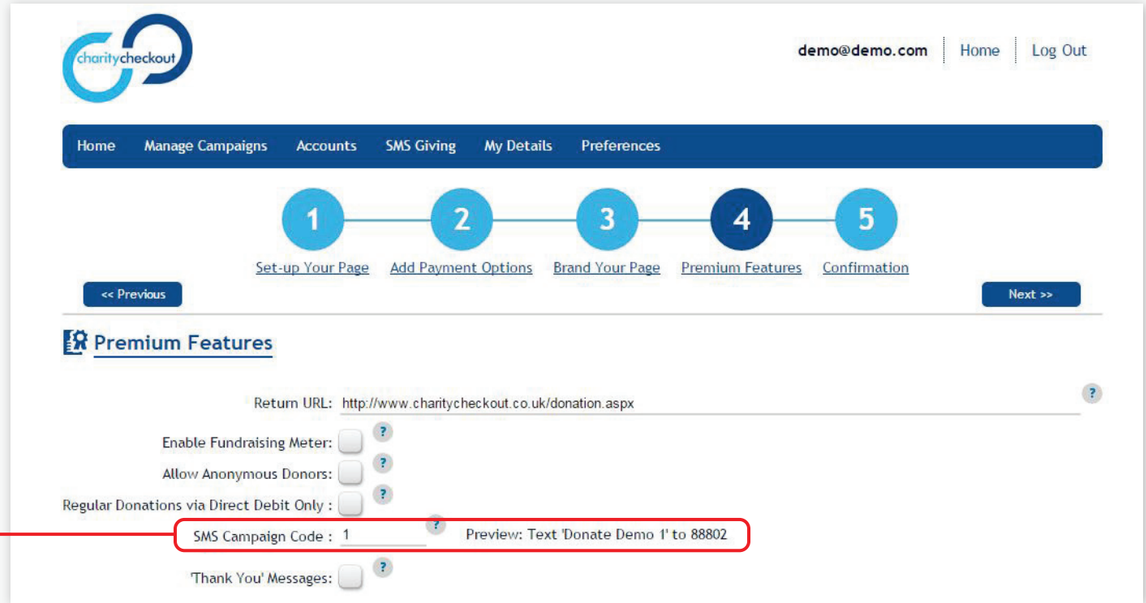
The Smart Text Giving feature allows your supporters to text the word ‘Donate’ followed by your charity’s keyword to 88802 triggering an SMS message with your payment link to be sent to their phone.

Setting up your campaign

In addition to your main keyword, you can set-up a sub-keyword to identify a specific campaign using this feature.

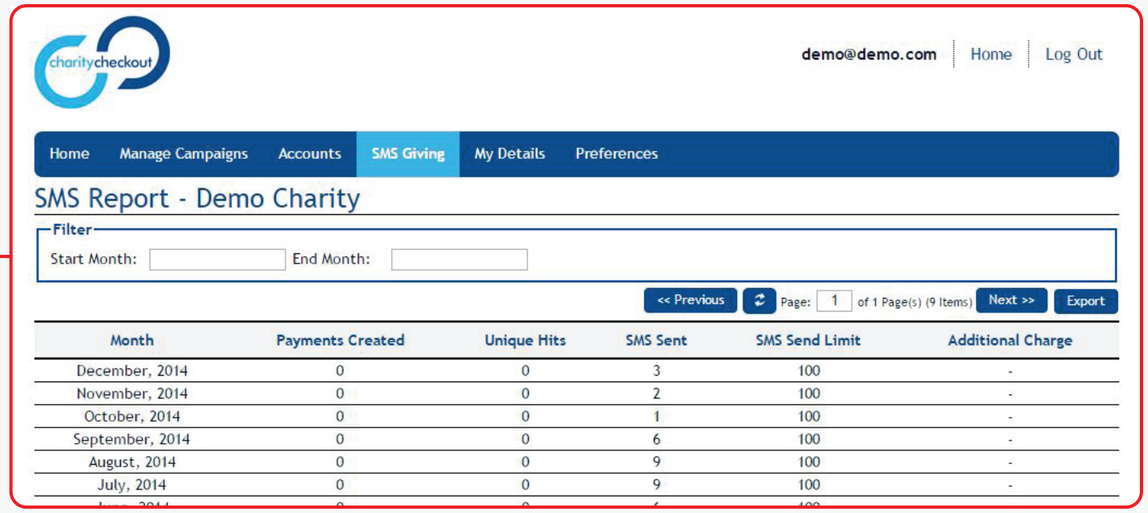
For example, if main keyword for the charity was ‘Demo’ and the sub-keyword for the Christmas Appeal was ‘Xmas’, the donor would need to text ‘Donate Xmas’ to access the payment page for this campaign. This allows your charity to promote multiple campaigns simultaneously via Smart Text Giving, each with its own keyword.

1 Click ‘Manage Campaigns’ 2 Click ‘Edit’ Campaign 3 Go to ‘Step 4’



Monitoring your usage

You can view the number of SMS messages sent via your Smart Text Giving feature and check the remaining send limit on your account. This page also displays the number of unique hits and payments that were as a result of Smart Text Giving.



Month	Payments Created	Unique Hits	SMS Sent	SMS Send Limit	Additional Charge
December, 2014	0	0	3	100	-
November, 2014	0	0	2	100	-
October, 2014	0	0	1	100	-
September, 2014	0	0	6	100	-
August, 2014	0	0	9	100	-
July, 2014	0	0	9	100	-

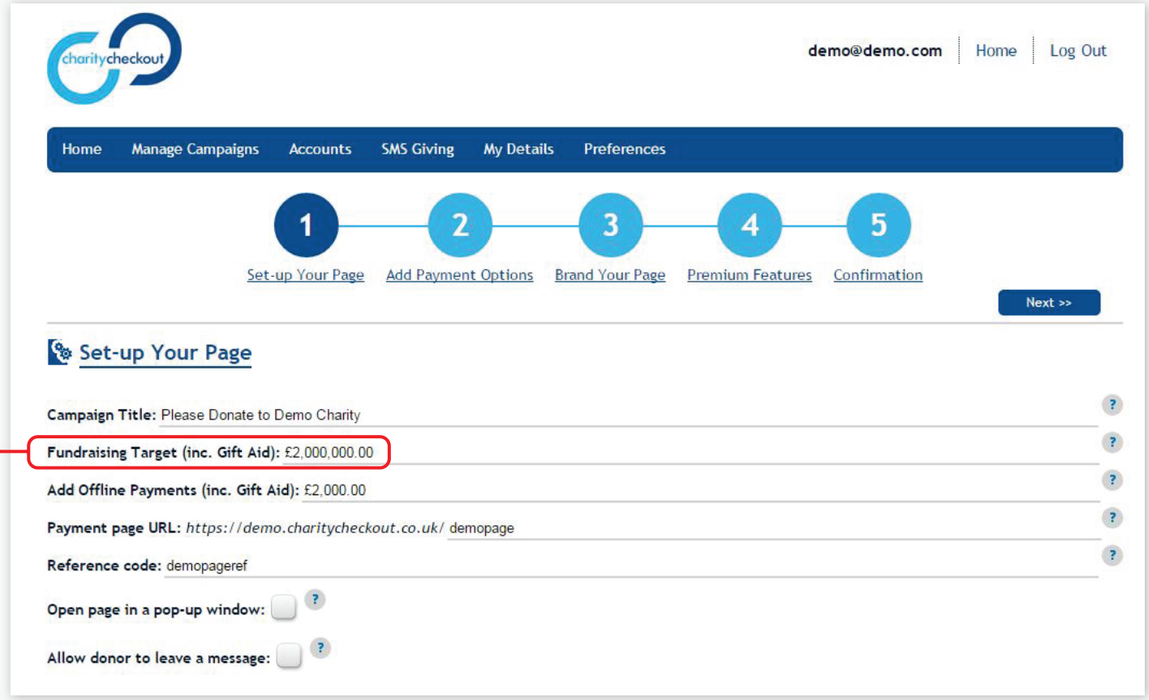
4.2 Fundraising meter

The fundraising meter allows your charity to display progress towards a specific fundraising goal for an appeal or campaign. This can be displayed both on the donation page and independently on your own website, using the code available on ‘Step 5’.

Setting up your target

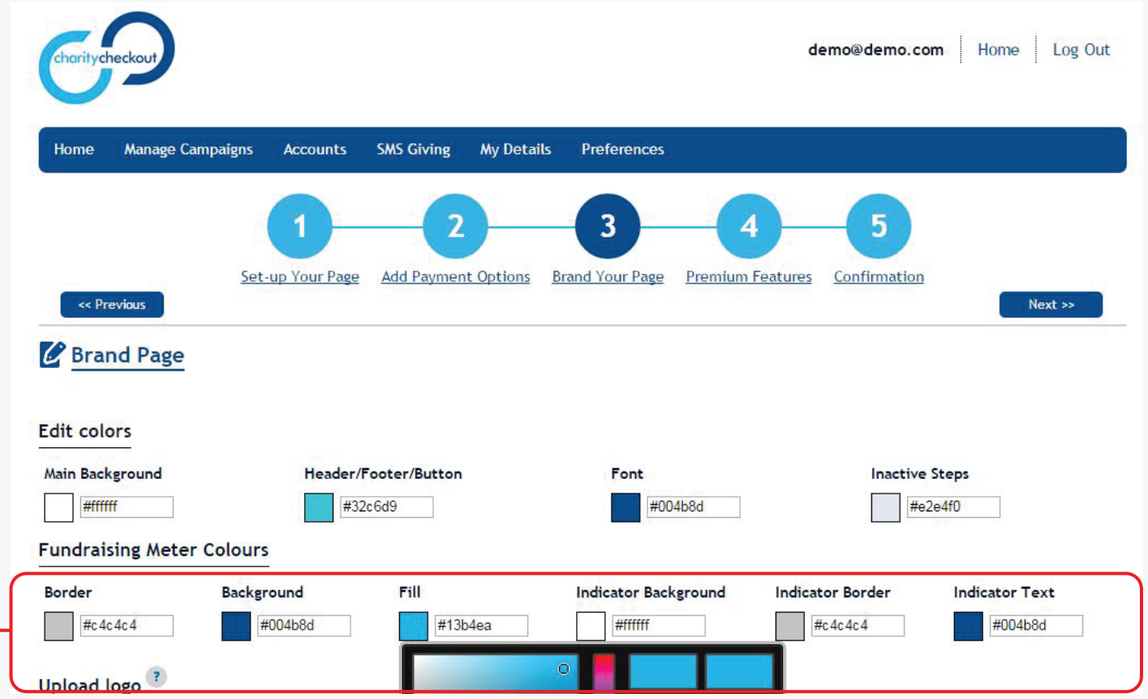
When setting up a new campaign you will have the option to add a fundraising target, this option will only be available if this feature is enabled on your account. You will also be able to add donations received offline towards your target.

1 Click ‘Manage Campaigns’ 2 Click ‘Edit’ Campaign 3 Go to ‘Step 1’



Branding your meter

When setting up a new campaign you will be able to brand and customise the look of your meter to match the design of your website and donation page.



4.3 Return URL & ‘Thank You’ messages

When setting up a new campaign on the ‘Premium Features’ step you will see an option to enable the Return URL and ‘Thank You’ Messages features. These allow you to thank your donors personally in two different ways.

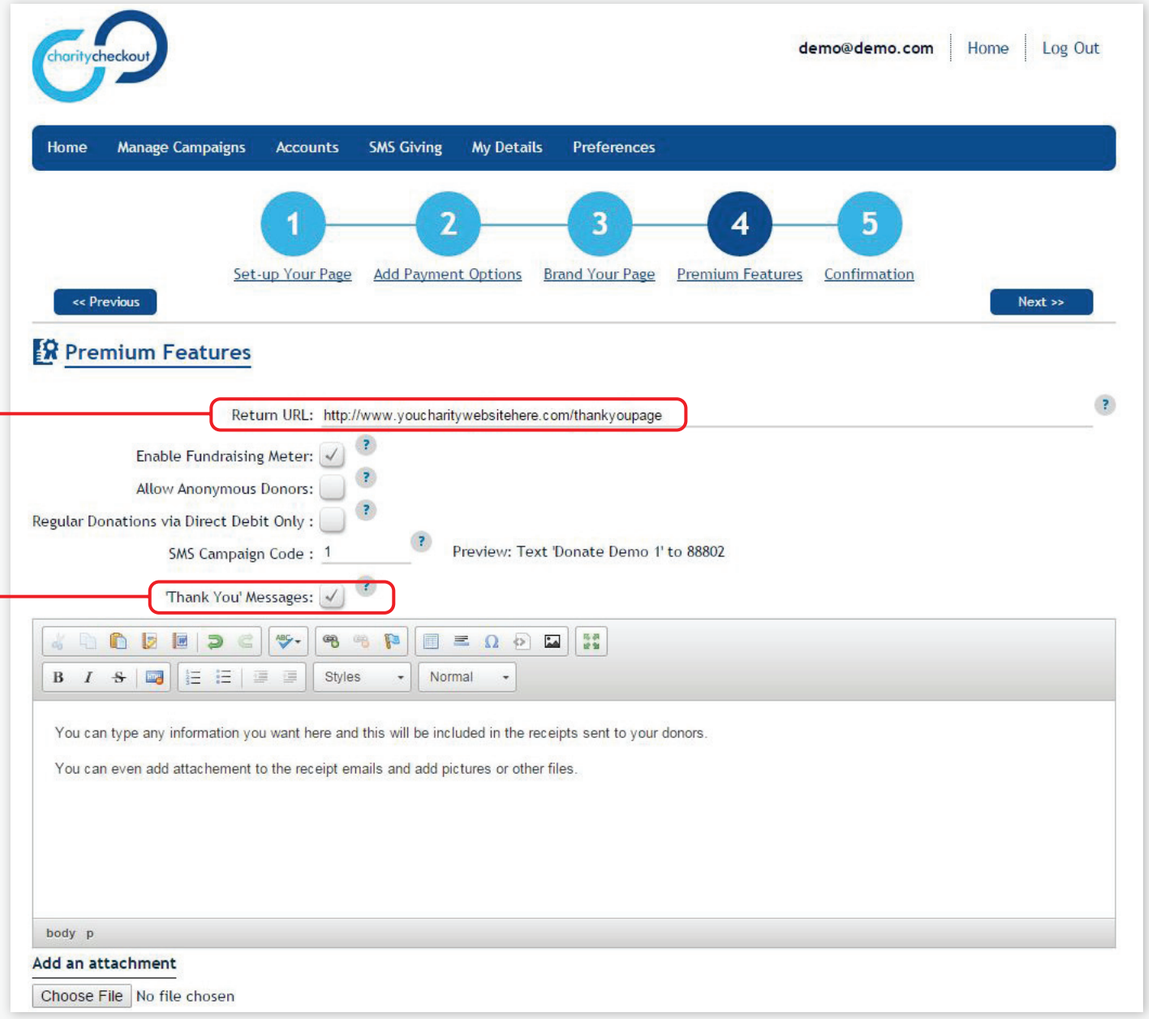
1 Click ‘Manage Campaigns’ 2 Click ‘Edit’ Campaign 3 Go to ‘Step 4’

Return URL

This allows you to choose a website address to return your donors to once they have completed their payment. Why not create a ‘Thank You’ page on your website to return donors to?

‘Thank You’ Messages

This allows you to customise the receipts your donors will automatically receive via email when they make a payment. You can add text, images and attach documents to this email.



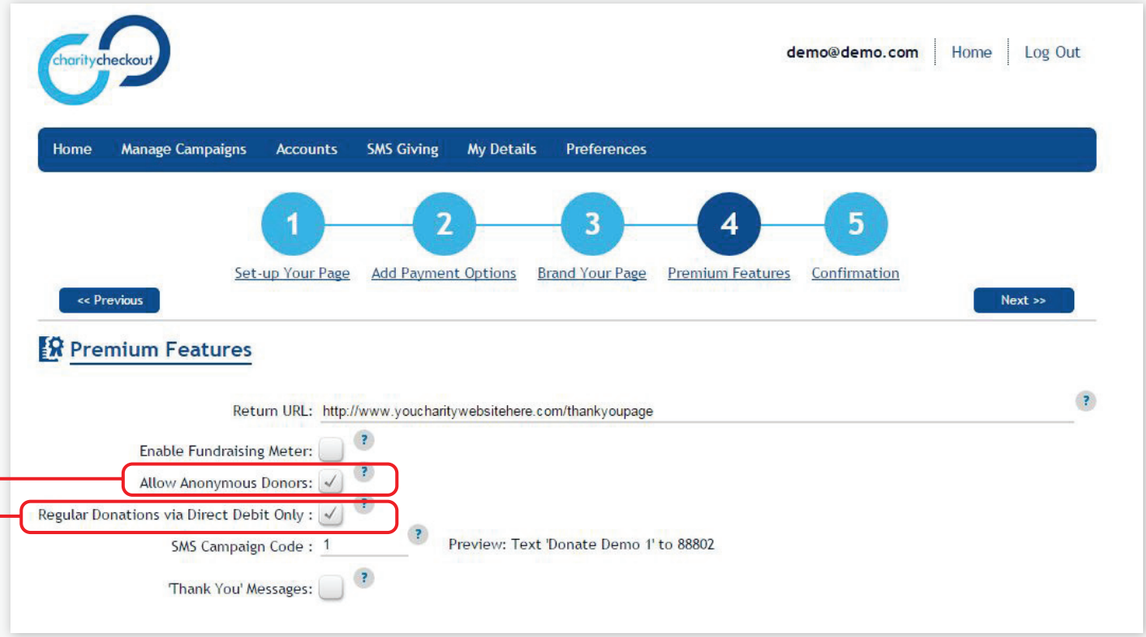
4.4 Anonymous donors

When setting up a new campaign on the ‘Premium Features’ step you will see an option to ‘Allow Anonymous Donors’. This will enable a check box on the donation page offering supporters the option to remain anonymous. If the supporter chooses this you will not receive their personal details.

4.5 Regular donations via Direct Debit only

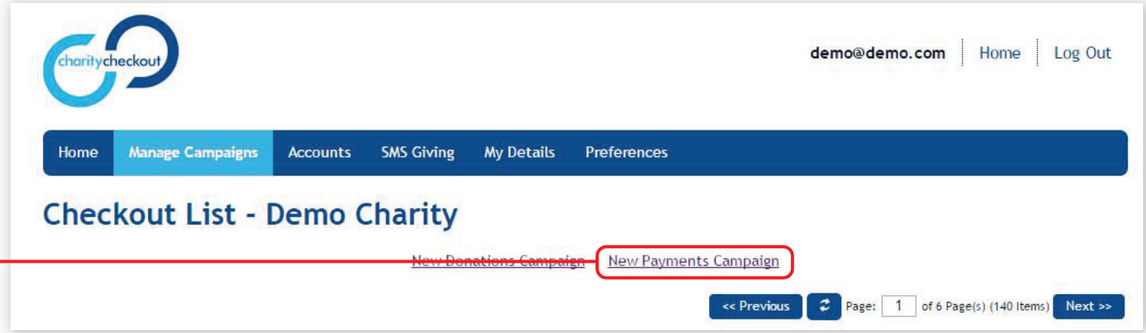
When setting up a new campaign on the ‘Premium Features’ step you will see ‘Regular Donations via Direct Debit Only’. If you enable this, credit/debit card options will not be available when donors opt to give regularly to your charity.

1 Click ‘Manage Campaigns’ 2 Click ‘Edit’ Campaign 3 Go to ‘Step 4’



4.6 Payments campaigns

This feature will enable you to setup a campaign for selling tickets or memberships. If you go to ‘Manage Campaigns’ you will see an option to create a ‘New Payments Campaign’. If you select this you can begin the setup process for a payments checkout. This type of campaign will allow you to specify the items available for purchase and the quantity available. However, in all other respects the set up process is the same as in section two of this user guide.



4.7 Custom domain URLs

This feature can only be configured by your account manager at Charity Checkout, in order to make changes to this please contact 01438 534 060.

Thank You

Thank you for reading this user guide, we hope you have found it useful. If you have any queries that are not answered in this guide, please feel free to contact us.

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